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MEMORANDUM

TO: TelQuest

FROM: Hart-Riehle-Hartwig Research

DATE: June 26, 1996

SUBJECT: Summary of Research

Between May 31 and June 4, 1996, Hart-Riehle-Hartwig surveyed a cross section of 1,502 adults nationwide in order to determine the proportion of American households with some level of interest in alternative ways of getting a television signal into their home. A total of 37% of households contacted expressed some amount of interest in new television service. An oversample brought to 792 the number of adults with some level of interest in new television service, and the margin of error for questions asked of this group is ±4%.

KEY FINDINGS

Three key findings emerge from this research.

1. **A broad segment of Americans express an interest in new television service.** The potential market for a new kind of satellite television service is much broader than the one in twenty households that currently receive conventional satellite service. In this survey, **37% of adults demonstrate interest in any type of new television service (broadly defined)** or report that they currently use a conventional satellite service, and 33% of adults overall (nearly nine in ten in the potential market) explicitly show an interest in direct

satellite service with local programming. **The market for satellite TV service *with local programming* is many times larger than is the current market for conventional satellite services.**

2. **Adults with an interest in exploring any type of new television service to their home have a strong antipathy toward any satellite service that fails to provide local news, weather, sports, and local programming.** In this survey, interested adults are no more likely to rate local programming as important than they are to rate national network programming as important; national and local programming are deemed equally important. At the same time, however, **71% of this group say that satellite service is less appealing if it cannot provide local programming, and 74% feel that a service is less appealing if it offers network affiliates from a city other than the one in which they live, with local news, weather, and sports from that other city.**

3. **In terms of policy, those with an interest in new television service overwhelmingly favor issuing a license to a U.S. company that would offer this new kind of satellite television service using a Canadian satellite.** Consumer interest in a new kind of satellite service that offers local programming already is very strong, but on policy grounds, attitudes are even more one-sided. Two-thirds (68%) of these interested adults favor issuing the license, more than 70% endorse each of three arguments *in favor* of issuing the license (compared to the fewer than 30% who find each of three arguments *against* issuance to be persuasive), and at the end of the survey, after having heard arguments on both sides, support for issuing the license rises to 72%. **Few Americans interested in new TV service see any justification for blocking their access to this new choice in direct satellite service.**

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MEMORANDUM

TO: **TelQuest**

FROM: **Hart-Riehle-Hartwig Research**

DATE: **June 26, 1996**

SUBJECT: **Executive Summary of Research**

METHODOLOGY

Between May 31 and June 4, 1996, Hart-Riehle-Hartwig surveyed a cross section of 1,502 adults nationwide in order to determine the proportion of American households with some level of interest in alternative ways of getting a television signal into their home. Overall, 33% of Americans express at least a slight interest in alternative TV technology, and 4% who otherwise express no interest in changing their home TV technology already have conventional satellite television. ***The total of 37% of households nationwide that demonstrate either an expressed interest in or are currently purchasing a satellite service represents the broad potential market for TelQuest.***

Hart-Riehle-Hartwig then conducted an oversample among those in this potential market for TelQuest, which brought to 792 the number of interviews in that broad market segment. These adults' responses to those questions asked of all respondents then were weighted down to reflect their actual proportion (37%) of all households. Most survey questions, however, were asked only of those in the broad potential market, and the margin of error on these questions (based on the actual number of interviews conducted) is ±4%.

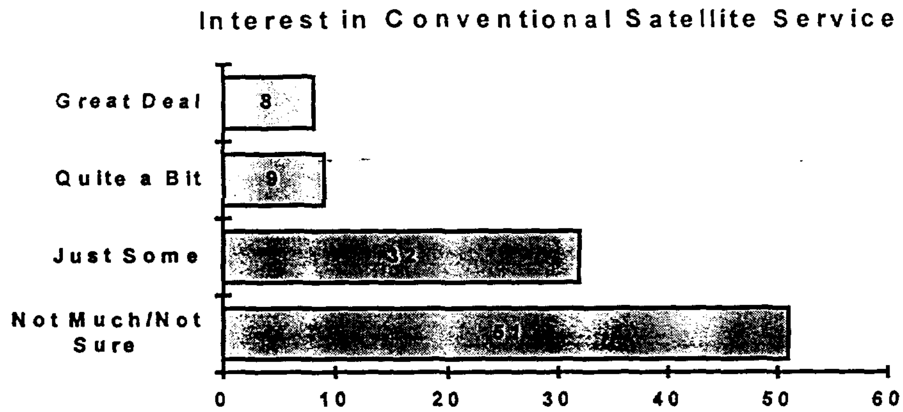
The following represents a summary of the key findings from the research.

EXECUTIVE SUMMARY

The primary advantage of TelQuest over conventional direct satellite services is TelQuest's ability to also provide local programming. **Local programming makes a big difference in the level of interest** expressed by adults in the broad potential market of households represented in this survey.

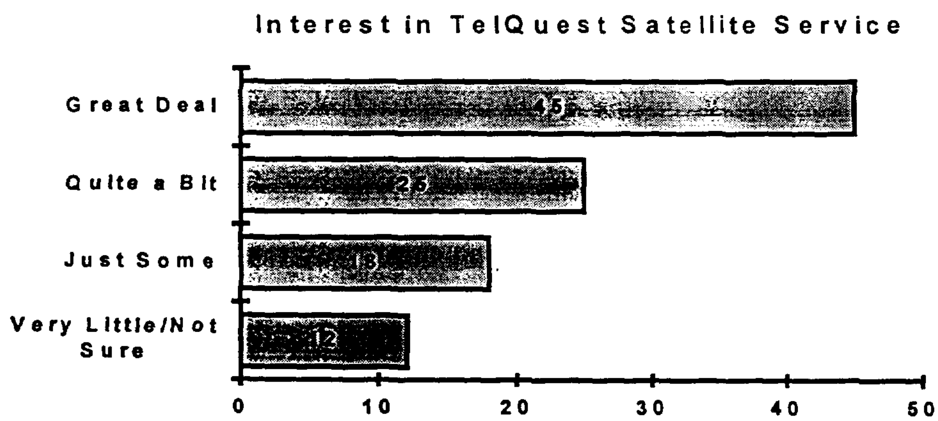
Low market potential of conventional satellite services currently available. Initially, those adults with some interest in any new television service express only lukewarm interest in the current conventional satellite services that do not offer local news, weather, or sports. Among households in the broad potential market, just 8% express a great deal of interest—and a majority (51%) express no interest or are not sure—in conventional satellite service *without local programming* described as follows:

> As you may know, currently, after a customer installs a satellite dish to receive television direct from a satellite, direct satellite television service provides 150 channels of cable programming, with CD-quality sound and crystal clear pictures. This service may involve upfront equipment costs, as well as the monthly fee. It does **NOT**, however, provide any local programs, such as local news, weather, or sports, or other local programming. Knowing this, how much interest do you have in subscribing to a direct broadcast satellite TV system--a great deal, quite a bit, just some, or not very much?



A few minutes later in the survey, respondents were asked to react to a description of the TelQuest service, described as follows, with much different results:

> Suppose a new direct satellite television service provided the national networks and cable stations <u>and also provided local TV stations, including local news, weather, sports, and other local programming,</u> in your area. The signal would come directly to a small device about the size and shape of a pad of paper on your home. Would you have a great deal, quite a bit, just some, or very little interest in subscribing to a service like that?



The failure of conventional direct satellite services to provide local programming makes these services much less interesting to households in the broad potential market for satellite services. Among those in this market:

- 68% say that local stations with local programs and local news, weather, and sports are extremely or very important to their household, which is virtually identical to the 67% who rate as equally important national network programming on NBC, ABC, CBS, and Fox (which conventional services may provide).

- 39% indicate that a service that does not offer local news, weather, sports, or independent stations would be *much less appealing* to them (and a total of 71% say the absence of local programming makes a service at least somewhat less appealing).

- 46% feel that a service would be *much less appealing* if it offered the national broadcast programming from another city, with news, weather, sports, and other local programming from that other city, rather than from their local city (and a total of 74% say substitution of some other city's local network affiliates makes a service at least somewhat less appealing).

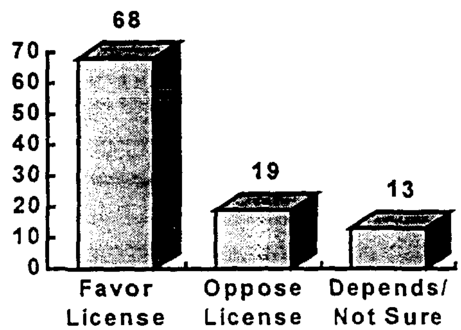
- 64% report that learning that a new satellite service would provide local programs, such local news, weather, sports, and other local programming, would make such a service *much more appealing* to their household.

- 73% say that knowing that a new satellite service would require a receiver the size and shape of a pad of paper, and not an 18-inch satellite dish, would make such a service *much more appealing* to their household.

Reaction to licensing policy issues among households in the broad potential market. The TelQuest service clearly proves superior to conventional satellite services, but would American consumers still support that service if they knew it used a Canadian satellite to provide the service? Adults from households in the broad potential market demonstrate little concern when informed about this issue, and they overwhelmingly favor issuing the license that would make this service possible.

Adults from households in the broad potential market were asked:

Currently, a U.S. company wants to offer such a service to households in the U.S., using a Canadian satellite for the service, instead of one of the U.S. satellites used by other direct satellite TV services. Would you favor issuing the license to allow the company to start offering the service to consumers in the U.S., or would you oppose issuing the license?



Adults in this broad potential market of households then were asked to react to an equal number of arguments for and against issuing the license. All three arguments in favor of issuing the license prove persuasive; all three arguments for not issuing the license prove unpersuasive.

Fewer than one in three of these adults find any of the three arguments for not issuing a license persuasive. Only 29% find very or extremely persuasive the retaliatory argument that Canada's restrictions on what U.S. programs Canadians can watch means that the U.S. should not allow use of a Canadian satellite to deliver programming to U.S. customers. Just 24% are persuaded that issuing this license would be unfair to companies that bid on U.S. satellite locations, and only 18% agree that foreign satellites should not be used to beam programming into the U.S.

More than seven in ten, however, find each of three arguments in favor of issuing a license to be persuasive.

Reactions to Arguments for Issuing License

	Extremely Persuasive Argument %	Very Persuasive Argument %
Because competition generally creates more choices and better services and products at a lower cost to consumers, government should encourage competition without delay	42	33
Consumers should have the right to choose new direct satellite TV services without the government interfering	43	30
Small companies willing to take on the large media by offering new services such as this one should be encouraged to compete, not blocked by government delays	40	32

After hearing arguments for and against issuing the license, the adults with a broad interest in new television services who are taking part in this survey are much better informed about the issues involved than are most adults. Their level of support for issuing the license that would allow TelQuest to offer this service rises from an initially very high 68% to an even higher 72%, as a result of hearing these arguments.

Conclusion: there is strong interest in new satellite service and in favor of the license. The results of this survey among 792 adults with a broad interest in new television service demonstrate the importance that people place on the ability to get local programming from local stations, and the far greater appeal that TelQuest has for them, compared to the conventional satellite services now available, as a result of its ability to provide local programming.

The issues facing the FCC in this case are complex and difficult ones. There may be some value to the Commission in understanding how households with some interest in the case (as a result of their status as potential customers) react when presented with some of the difficult issues involved. In this case, more than two-thirds (68%) initially support issuing the license after hearing a very general description of the issues involved; support for licensing only increases after these adults have been exposed to arguments for and against issuing this license.

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MEMORANDUM

TO: **TelQuest**

FROM: **Hart-Riehle-Hartwig Research**

DATE: **June 26, 1996**

SUBJECT: **Survey Results**

It would be a mistake to assume that consumers are beating down the doors to get the kind of new direct satellite television service TelQuest can offer. At the same time, it would be just as much of a mistake to believe that the market for direct satellite television service is as small as that carved out by the conventional satellite services now available. What the results from this survey show is that the potential market is much bigger than the mere one in twenty households now using the services currently offered (none of which provides local programming, as TelQuest would). The ability to offer local programming will have an immediate and big impact on the expansion of the direct satellite television market.

Most Americans are satisfied with their television service. Among all adults, 84% are satisfied with the way they receive television in their home today, considering all the signal delivery choices that are available. Many who are satisfied with their current choice in television technology, however, also would be interested in an alternative if a new kind of service were made available to them.

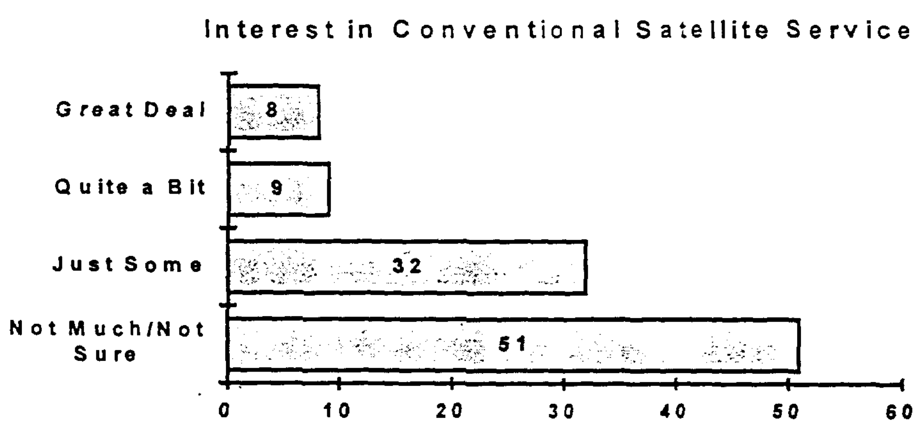
Overall, 33% of all adults have at least a slight interest in looking at alternative ways of getting television; in addition, 4% of Americans already subscribe to a conventional satellite service without local programming, and therefore also might be interested in investigating a new service such as TelQuest's that would offer direct satellite service with local programming. For this survey, our focus is on the total of these two groups—the 37% of adults overall who currently have satellite service or express an interest in looking at alternative ways of getting a television signal into their home.

Awareness of and interest in current conventional satellite services. Adults in the broad potential market are aware that one of their current choices is direct satellite service. Nearly nine in ten (89%) report that they have heard of direct satellite television services like DirecTV, Primestar, or Echostar, which provide national networks and cable stations, but not local area stations. Among this knowledgeable group, 28% say they know a great deal or quite a bit about the direct satellite system for delivering television programming.

Only 13% of those in the broad potential market are current subscribers to satellite services, and almost all of these subscribers rate their service as excellent or good. Among current subscribers, 63% have found ways to get local programming; overall, 33% of conventional satellite service subscribers receive local programming over the air through an antenna, but 19% pay for cable service in addition to paying for satellite service, while 11% use other means or a combination of methods.

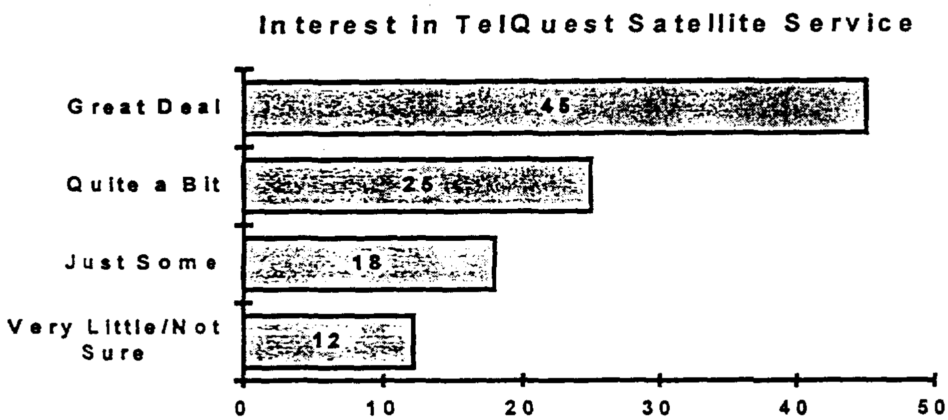
Among those not now subscribing to a satellite service, response to a description of the kind of conventional satellite service now available engenders a lukewarm response. Only half (49%) express even some interest, and indeed, just 17% express a great deal (8%) or quite a bit (9%) of interest in a service described as follows:

> As you may know, currently, after a customer installs a satellite dish to receive television direct from a satellite, direct satellite television service provides 150 channels of cable programming, with CD-quality sound and crystal clear pictures. This service may involve upfront equipment costs, as well as the monthly fee. It does <u>NOT</u>, however, provide any local programs, such as local news, weather, or sports, or other local programming. Knowing this, how much interest do you have in subscribing to a direct broadcast satellite TV system—a great deal, quite a bit, just some, or not very much?



A few minutes later in the survey, the following description of the TelQuest service is presented, with much different results:

Suppose a new direct satellite television service provided the national networks and cable stations <u>and also provided local TV stations, including local news, weather, sports, and other local programming,</u> in your area. The signal would come directly to a small device about the size and shape of a pad of paper on your home. Would you have a great deal, quite a bit, just some, or very little interest in subscribing to a service like that?



The failure of conventional direct satellite services to provide local programming makes these services much less interesting to households in the broad potential market for satellite services.

The importance of local programming and receiver size. In all, 27% of those in the broad potential market either currently know about and subscribe to satellite services (12%) or if they are not knowledgeable about or do not currently subscribe to satellite services, express a great deal or quite a bit of interest in the conventional services now available (15% of the potential market, which reflects 17% of the 87% who are not knowledgeable about or not subscribing to satellite TV). By comparison, 70% of those in the broad potential market express an interest in a new kind of satellite service such as TelQuest might provide, which would include local programming, and which would arrive via a small receiver about the size and shape of a pad of paper. The enormous 43-point gap between the 27% of the potential market with an interest in (or a current subscription to) conventional satellite services and the 70% with a strong interest in a TelQuest-type service reflects the importance of local programming and the size of the subscriber's receiver in determining whether a household will choose to subscribe.

Nevertheless, survey participants in the broad market for new TV services do not express an unusual attachment to local programming: although they rate the importance of national network programming on NBC, ABC, CBS, or Fox very highly (67% say such programming is extremely or very important to their household), they do not rate the importance of local programs and local news, weather, and sports any higher (68% extremely or very important).

It is the *absence* of local programming that many of those in the potential market deem unacceptable when it comes to satellite services currently on the market. Some 71% of those in the market for new television services report that NOT having local programming such as local news, weather, sports, or independent stations makes a direct satellite television service at least somewhat less appealing to them, including 39% who say that such an absence makes the service *much* less appealing.

Many conventional satellite services now on the market offer subscribers a substitute for local network affiliate programming by feeding them programming from a local network affiliate from a city other than the one in which they live. In this survey among those in the broad market for new TV services, this type of substitution actually is *less* appealing than even the total absence of local programming—74% say that offering ABC, NBC, CBS, or Fox stations from another city (with news, weather, sports, and other programming from that other city) makes a satellite service at least somewhat less appealing, including 46% who say this substitution makes such a service *much* less appealing to them.

Features that make a satellite service appealing. In this survey, adults in the broad potential market rate whether specific satellite service features make a service *much* more appealing to them. Two-thirds (64%) say that providing local programming makes a service much more appealing, and nearly three-quarters (73%) feel that having a receiver that is the size of a pad of paper makes the service much more appealing. Putting into context the high appeal of these endorsements of TelQuest's unique advantages, however, only 46% think that providing many more channels than the local cable service is something that makes a satellite service much more appealing to them, though 76% say that CD-quality sound and a crystal-clear picture makes a service much more appealing. Local programming and smaller receiver size will prove to be important selling points in expanding the market for direct satellite service to households.

The best selling point for a satellite service, however, is content. *Better* and expanded programming proves by far the most important reason for getting a direct satellite service. Among those who either are already subscribers or nonsubscribers with at least some interest in *conventional* satellite services (who make up just over half of all of those in the broader potential market for new television services), 37% choose better and expanded programming as the single main reason why they are interested in *conventional* satellite service. And this reason makes up more than the other two choices combined—18% say the main reason for their interest is superior service and transmission, and 14% say lower cost for television is the main reason for their interest in *conventional* satellite service (while 18% say it is a combination of two or more of these three factors, and 13% are not sure). In the end, the overall package of television entertainment offered—the quality of the content and its relevance to the viewer (hence, the importance of local programming)—is what sells any television service.

Broader telecommunications issues. The roughly one-third (37%) of households in the broad market for new television services are not unusually interested in experiencing all the latest new technologies. When it comes to purchasing new communications technologies for the home, about half (49%) describe themselves as being at the cutting edge ("one of the first to try new things") or aggressive ("start using new things after I see them work for a couple of people"). The other half (47%) describe themselves as cautious or slow when it comes to new technologies.

Most feel satisfied with the progress being made toward providing new, high-tech information and entertainment services to the home. Overall, 63% of all those in the broad potential market say they are satisfied with the pace of new home communications technology—although dissatisfaction with progress is marginally higher among those who describe themselves as cutting edge/aggressive adopters (27% are frustrated) than among those who are cautious/slow (21% frustrated, with a greater number who are not sure how they feel).

In that context, those households in the broad market for new television services are not demanding more and more telecommunications breakthroughs. At the same time, they are more likely to expect those breakthroughs to come from the sky, and not from a wire. Overall, 57% say that direct satellite television services will be a major player in the development of new information and entertainment services to the home, compared with 49% who feel that way about cable companies, 45% about long distance companies, and 43% about local phone companies. The anticipation of breakthroughs from satellite service is greatest among those who describe themselves as cutting edge/aggressive adopters of new technologies, 60% of whom expect direct satellite television services to deliver those breakthroughs (compared to 47% among this group who feel that way about cable companies, 50% about long distance companies, and 42% about local phone companies).

Conclusions. The market for direct satellite television service is broad, but not universal. It is a market that could be many times larger than its current narrow slice of one in twenty households; at its broadest, it already represents 37% of all American households.

In this survey, those in that broad potential market express a common-sense approach to assessing the consumer and public policy issues raised by TelQuest's alternative satellite service. When it comes to conventional satellite services now available, what sells a person on the service is the quality of the programming content he or she can receive. Barely one-quarter of households in the market express strong interest in conventional satellite services, however.

Two features make TelQuest's alternative option much more appealing than conventional services currently on the market—the size of the receiver and the provision of local programming such as local news, weather, and sports. People do not overestimate the importance of local programming compared with the kind of network programming some conventional services now offer—they rate local and network programming as equally important. The *absence* of local programming, however, drains away interest in conventional satellite services.

Telling consumers in the broad market that a new satellite service could provide local programming makes all the difference in the world. When a conventional service is described, a total of 27% of the potential market report either that they already subscribe to such a service or are nonsubscribers who would have a strong interest in doing so. When the TelQuest option is described, however, 70% express strong interest.

Beyond consumer issues, those in the broad market express an even stronger consensus on the issue of public policy that might restrict their access to choices such as the TelQuest alternative. Two-thirds (68%) of adults in this market support issuing TelQuest a license, after hearing a short, balanced description of the issues involved. Overwhelming majorities then go on to reject the arguments against the license, and to endorse the arguments in favor of the license. Learning more about the issues involved causes support for the license to grow to 72%.

Consumers with an interest, large or small, in the issue—by virtue of their interest in exploring new options in television service—indicate a strong preference in this survey for maximizing the choices available to them. They brush aside as irrelevant or unpersuasive to them the objections to the specific means by which TelQuest intends to deliver this alternative satellite service.

CERTIFICATE OF SERVICE

I HEREBY CERTIFY that on August 21, 1996, a copy of the foregoing Comments of TelQuest Ventures, L.L.C. was delivered, by first-class mail postage pre-paid, or by hand delivery (as indicated by an asterisk) to the following:

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